

RFP 214006 - Review of Montana's Energy Performance Contracting Program

Scoring Matrix

Criteria	Possible Points							Trident				PFM				CTA				ARUP				NCAT				Comments
		LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final			
Provision of Services																												
Experience in energy performance contracting industry																												
Reviewing energy performance contracting contracts between energy services companies and state and local governments	150	145	150	75	120	95	125	145	150	145	150	145	150	150	50	95	75	75	120	100	150	120	50	95	100	95	ARUP: No obvious experience in Montana; not much information re: their role with performance contracting and did not show interaction with state or local governments; information was difficult to find and the proposal was poorly organized. CTA: Limited experience NCAT: No discernable experience working with state and local governments on energy performance contracting; did work for Northwest Energy under their performance contract; supports their ability but no direct experience. PFM: Strong, broad background; has also worked with small facilities. Trident: Impressed with team; worked with ESCOs; very strong experience; ; team member supplied National Standard for school procurements.	
Knowledge of and/or experience with energy performance Contracting legislation	125	110	125	70	60	70	100	125	100	110	125	125	125	125	50	80	75	70	70	75	50	60	60	75	75	70	ARUP: Unable to find direct experience developing legislation affecting performance contracting CTA: Some knowledge of and experience in working with legislature, however, experience did not include being a lead developer of legislation. NCAT: Have experience testifying on behalf of legislation, but does not appear offeror has been in process of making legislative recommendations; have worked on other energy issues but not directly with energy performance contracting. PFM: Strong background; finished development model legislation for Department of Energy; has worked with multiple states. Trident: Good experience; worked a lot on legislation and is working directly with Wyoming & Colorado on their legislative processes for energy performance contracting; some experience appeared to be working on something others created rather than that they created it.	
Setting or recommending policies for energy performance contracting	125	115	125	65	80	75	100	125	100	115	125	125	125	125	50	80	50	65	80	80	125	80	60	75	75	75	ARUP: Proposal did not reflect broad experience with performance contracting; could glean from proposal that Offeror had background knowledge and knew the pitfalls, and what policies should be in place. CTA: Offeror has some experience in Montana but none nationally. No mention of the Department of Energy. NCAT: Have worked with two ESCOs, limited experience recommending policies for energy performance contracting. Trident: Work with Colorado, Arkansas, and Wyoming indicate an ability to work with nuances of states; comments showed additional innovation; Colorado and Wyoming work is good in relation to Montana.	

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							LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	LM	RP	AS	Final	
Experience consulting with state energy officer or state and local government on energy performance contracting	100	100	100	50	70	60	90	100	100	100	90	100	100	100	50	65	25	50	70	60	100	70	45	50	100	60	ARUP: Proposal showed experience in reviewing performance contracting work rather than an interactive relationship. Some credit for contract development and negotiation skills. CTA: Has limited energy performance contracting with one State Energy Office; has provided some education to local governments. NCAT: Very little experience expressed in proposal and what was, was not directly related to energy performance contracting. Trident: Very involved with State Energy Offices; 14 years experience leading energy performance contracting work.
Knowledge of or experience in processes associated with financing of energy projects	100	80	100	60	70	50	80	95	75	80	90	100	100	100	20	65	75	60	70	65	100	70	20	65	100	50	ARUP: Minimal expertise with funding mechanism; proposal lacked information on types of funding mechanisms used for performance contracting CTA: Indicated general working knowledge of financing related to energy performance contracting, but no actual experience working with anything other than financing for engineering work. NCAT: Cited knowledge of utility incentives but no other experience with energy performance contracting financing; proposal showed an understanding of financing component but no direct experience. PFM: Have a financial consultant on the team. Trident: Working knowledge of various financing sources; broad background and understanding of financing options; did not include economic analysis, which is a part of this piece.
Experience in facilitating meetings and bringing groups to consensus	100	100	95	60	70	85	85	100	100	100	85	95	100	95	50	65	50	60	75	65	100	70	50	85	100	85	ARUP: Experience cited was "education" on topic rather than working with groups to build consensus. CTA: Offeror is construction project oriented with limited opportunity for consensus building as needed for energy performance contracting. NCAT: Participated in the consensus process but did not "lead" it; have experience with surveys. PFM: Very good experience, but not exceptional. Trident: Very broad experience in meeting facilitation and consensus building.
TOTALS	700	650	695	380	470	435	650				695				380				470				435				
Client Reference Questionnaire (based on average of 3 references)	50	45	46	43	43	45				45				46				43				43				45	ARUP: 43 CTA: 43 NCAT: 45 PFM: 46 Trident: 45 See Attached Calculations
Cost Proposal (based on formula provided)	200	186	68	200	94	72	Scored Based on Calculation 186				Scored Based on Calculation 68				Scored Based on Calculation 200				Scored Based on Calculation 94				Scored Based on Calculation 72				Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest using the following formula: Lowest Responsive Offer Total Cost / This Offertory's Total Cost x Number of available points = Award Points See Attached Calculations Note: calculations were rounded up to the nearest whole number
TOTAL OVERALL POINTS	950	881	809	623	607	552				881				809				623				607				552	
							Trident				PFM				CTA				ARUP				NCAT				

Evaluation Committee:
LM = Lou Moore
RP = Ron Pecarina
AS = Andrea Stinson